



## **Passing the Torch: The Importance of Institutional Memory**

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This workshop aims to lay out a framework to think deliberately about leadership transition. If you have any follow questions or comments, please feel free to email either or both of us, we're happy to continue the discussion at any time. — Chris & Will

This handout gets into specifics about what needs to be explicitly passed on to the next generation of leadership to transition smoothly and help the group continue to succeed. This mentorship should start as early as possible. Ideally, members with clear leadership potential can be identified soon after they join the group and included to observe some of the behind-the-scenes decision making of the current leaders, even though it may be years before they actually assume the position. It is also worth developing concise and efficient materials to facilitate transitions of leadership using collaborative online platforms, which can easily grow and evolve over the years to keep information well-organized and easily accessible.

### **Preserve and catalog information whenever possible**

1. Create a separate group account on a cloud platform (Google is ideal) to maintain a central repository of information to be passed on from year to year.
2. Create separate group accounts for all online services the group uses, and securely store login and password information for each website in a single location.
3. Keep spreadsheets of financial records.
4. Keep a list of important contacts for the various needs of the group.
5. Maintain a list of alumni with years in the group, leadership roles, major contributions (i.e. arrangements, solos, etc.), and updated geographic and contact information.
6. Maintain an arrangement library with notation files, PDFs, and MIDIs.
7. Archive any other materials that you reasonably can, you never know what might be useful down the road. Consider paying for increased cloud storage for the group account so that space will never be a limiting factor to impede preservation of information.
  - a. Project files for posters, programs, concert riders, album art, liner notes
  - b. Keep audio/video recordings from concerts or important rehearsals.
  - c. If producers will provide them, archive the actual recording/editing/mixing/mastering sessions from albums.
  - d. Miscellaneous materials - Consider scanning things like awards, judging sheets, etc. into PDFs immediately after events, as the originals will likely be lost.

**Recurring events** - Although group membership turns over regularly, most groups tend to do the same major activities and events each year. Institutional memory helps to assure that important details aren't missed and mistakes are avoided when planning for these events.

1. Auditions - Groups depending on recruiting the best possible talent to perform at the highest levels. Auditions are a two way street. Obviously auditionees are trying to impress groups to get in, but groups also need to impart a good impression on the very best talent to successfully recruit them to join, since they will likely get into multiple groups.
  - a. Phases of process - Most groups use a short initial audition to screen out most auditionees and then a longer more intensive callbacks before final decision are made.
  - b. Skills testing - Auditions are essentially an information gathering exercise. Groups want to identify exceptional auditionees across a wide range of talents and skills
    - i. Musicianship - Tasks like sight-singing, tonal memory can be very informative, but are challenging to do well. In addition to testing specific skills, these reveal a lot about underlying musical instincts, sense of pitch, tuning ability, etc. Exercises also need to be hard enough to let the geniuses differentiate themselves from those with basic skills, but you don't want 95% of your auditionees leaving the audition feeling like a failure. Though this topic would warrant a class all on its own, an argument can be made that this is the single most important aspect of auditions -- it would be much better to have a group full of great musicians and mediocre solo ability than group full of singers with strong solo voices but mediocre musicianship. It only takes one singer that can't tune well to destroy the whole group's sound.
    - ii. Soloist potential - Group need at least a few good soloists, and this is almost always tested by having auditionees sing a portion of a song of their choosing.
    - iii. Other musical / performing skills - Even in auditions, groups want to keep an eye out for who shows potential as an arranger, choreographer, beatboxer, along with leadership roles in the group.
    - iv. Social fit - Groups weigh this aspect differently depending on their priorities. At minimum, everyone in the group needs to get along well enough for the group to function, but don't necessarily need everyone to be best friends.
  - c. Convey the group culture
    - i. Auditions are high-stakes for both the group and the auditionees. Coming off as too intense, serious, arrogant, or mean can be very counterproductive and can easily happen unintentionally. At the same time, make sure current members stay focused and don't distract or interrupt inappropriately.

- ii. Set expectations for behavior amongst current group members and remind everyone that auditionees will be hypersensitive to what current members do and say during the auditions process.
    - iii. Allocate break time during callbacks for friendly interactions to help mitigate stress and keep a friendly tone.
  - d. Rehearse specifically to make sure the group is well-prepared for callbacks. If you're asking auditionees to learn musical exercises or parts of arrangements, make sure the current members of the group know them really well to set a good example.
- 2. Major concerts - Putting on shows can be very complicated, and often requires certain tasks to be completed well in advance.
  - a. Venue - Keep information about the usual venues the group has performed in, specifically which have worked well and which haven't, what venue-specific problems have come up, how much they cost to rent, how far in advance they must be booked, and the primary contacts at the venue.
  - b. Sound and lighting - Who does the group usually hire to do these tasks, how much do they cost, how do you contact them. What information needs to be prepared in advance for this (e.g. a rider with a set list and specific instructions for each song).
  - c. Ticketing - What platform does the group use, how much does the group typically charge
  - d. Promotion - How does the group advertise concerts, and which approaches have worked better or worse. If the group makes posters and/or programs, save the original project files in the group's cloud storage to make it easy for future years.
- 3. Competitions - While groups should strive to create unique and exciting competition sets, there is somewhat of a formula for success which can take years to figure out the first time, but is fairly easy to preserve and replicate if the right information is passed on.
  - a. Understanding the unique characteristics, strengths, and challenges of the format
    - i. E.g. an ICCA competition involves ~10 groups, each singing 12 minutes of music. From a judge's perspective, it's very easy for most groups to be a vaguely-remembered blur. Finding ways to stand out and be memorable is absolutely key to success.
  - b. The importance of "moments" - These are the points in the set where the music, visuals, soloist, etc. all come together to create a striking moment that persists in the minds of the audience and judges throughout all the other groups in the competition.
    - i. These are so critical - Moments should be envisioned as songs are being chosen for the set and well before specific arranging starts, and the whole set should be crafted around them.
    - ii. Ideally the set should have one of these moments within the first 30 seconds of the set, and should have another in the last minute.
      - 1. An early moment will set the tone in the minds of the judges for the entire rest of the set

- iii. Creating genuine moments is really hard. If it seems more like you're trying really hard to have a moment, more than actually having one that feels natural and real, it will be counterproductive.
    - iv. A good strategy is to try and create something sudden and somewhat unexpected. A very rapid dynamic, textural, harmonic, etc change will have much more impact than a slow build over a whole section of a song.
  - c. How are songs selected for a competition set
    - i. Many groups just pick 3 or 4 of the best songs from their repertoire. This can work if the group is naturally extremely talented with hypercarry soloists (e.g. certain groups whose members are virtually all vocal performance majors).
    - ii. For groups with less natural raw star power, a more deliberate approach in designing the set to feature the group's strengths and mitigate its weaknesses is required to be able to compete with the perennial monsters.
  - d. How to arrange for the competition - This is a huge topic which easily warrants its own workshop, but as a few examples:
    - i. Bass parts - Competitions usually have a bass mic which can be turned up as needed. Therefore it is wise to have only your strongest bass singing the rhythmic bass part, and have your other "basses" sing more vocal baritone parts. This will avoid tuning clashing on the foundational notes and make the group sound much bigger and fuller than it usually might.
    - ii. Dynamics - Sound systems usually apply an effect called compression which creates a more consistent sound but significantly decreases the impact of dynamics. To achieve the same effect, dynamics must also involve a significant change of tone (I.e. pianos should be very airy while fortes should be full-bodied and bright).
  - e. How to rehearse for the competition
    - i. Gather information as soon as possible
      - 1. Sound system details
        - a. How many mics will be available
        - b. Will there be an octave on the bass mic
      - 2. Stage dimensions
      - 3. How long is sound check
        - a. Rehearse sound checks in advance to make efficient use of limited time
    - ii. Try to have at least a few rehearsals that replicate the competition environment as closely as possible.
    - iii. Have singers who will be miced always rehearse holding water bottles or phones as soon as choreo is added to make sure the choreo works with mics and get singers used to practicing good mic technique (I.e. treat the

- mic like a face appendage that never moves further than an inch away from the singers mouth no matter how the singer is moving, dancing, etc.)
- iv. Choreograph or at least explicitly plan your entrances, song transitions, and exits. Though it takes minimal effort, most groups don't think to do this. It makes a group look much more professional when done well and is very worth the little bit of extra time and effort.
  - v. Anticipate the adrenaline rush - During the actual competition, adrenaline will be much higher than in any rehearsal, and this can lead to singers feeling extremely out of breath when they don't expect it. Do a few runs where everyone does 2 minutes of jumping jacks right before running the entire set to simulate this and practice managing it.
    - 1. The key is breathing out more. The feeling of shortness of breath has to do with CO2 buildup which must be exhaled, not a lack of oxygen. Practice taking deeper and more frequent breaths than feels necessary early in the set to avoid CO2 building up too much.
  - f. What to expect the day of the competition
    - i. Make sure everyone has a clear understanding of where to be and when for check in, sound checks, rehearsing, food, and performing
    - ii. Unexpected surprises lead to stress, and a tense, stressed group will struggle to perform at the highest level.
  - g. Set healthy expectations for the outcome
    - i. No matter how successful a group has been in the past, a group should never go into a competition assuming they will win. It is fundamentally unknowable and losing when a win is assumed can be detrimental to group culture.
    - ii. A group can only control what it does, and if another group steps up with an amazing set and wins, but the group performed its set at the highest level, the group should still come away feeling good and accomplished, and perhaps a bit inspired and hungry, rather than angry and bitter.
4. Albums - Album production is a multiphase process which requires a great deal of planning. Small inefficiencies can add up to substantial increases in expense, and lack of preparation can also significantly affect the musical quality of the track as well.
- a. Create a budget and timeline for each phase of the process and make sure the producers are aware of the bigger picture plan well in advance so they can raise any concerns early. Briefly, album production can be divided into recording, editing, mixing, mastering, and if producing physical copies, replication.
  - b. Producers - Keep a list of which producers the group has worked with, their contact information, how the group felt about the quality and timeliness of their work, how much they charge, etc.
  - c. Preparation for recording sessions - Recording is expensive and usually paid by the hour, so sessions need to run very efficiently.

- i. The producer will some materials in advance (e.g. MIDI's of the arrangement).
    - ii. Are arrangements being edited for recording.
    - iii. Performing well in the studio is a different skill from performing live. What steps are taken to make sure each singer knows their part well and knows what to expect in the session.
  - d. Distribution and/or replication - Does the group have a distributor they work with to get their albums on online platforms? Does the group make physical copies of albums and if so, which replicator do they use?
  - e. Album art and liner notes - Save the project files
- 5. Fundraising - Keep details of the funding sources, applications, and campaigns the group has used in the past.
  - a. University - Many universities have programs that allow student groups to apply for funding. Keep a list of what options are available. If any have been used, the application documents can be a huge time saver since much of the application is likely to be very similar.
  - b. Alumni - Does the alumni base contribute money to the current group? Keep a list of which alums tend to donate. If this is a major source of funding, consider setting up an alumni foundation for the group to keep dialog open and the process streamlined.
  - c. Crowdsourcing - Document experiences with campaigns like Kickstarter, Gofundme, Patreon, etc.
- 6. Touring
  - a. A repository with information about how to plan a tour can be very helpful
    - i. Booking housing and travel, finding gigs, social concerts/events with other groups.
    - ii. Keep organized documents with specifics for each tour in case the group travels to the same place in the future.
  - b. Historical information about previous tours, what worked well and what went wrong will also be beneficial
- 7. Alumni interaction - There is great value in preserving a strong connection between the group and its alumni, where both the group and the alums benefit.
  - a. Despite the best efforts to preserve and pass on knowledge, it is impossible to capture everything, so being able to contact alumni with questions can be invaluable.
  - b. Some alumni get a lot of satisfaction out of feeling engaged and involved and may be more likely to contribute. Similarly, current members will be alumni very soon and will appreciate a continued connection to the group.
  - c. Alumni may be a source of funding, arrangements, housing on tour, etc. as the groups needs vary from year to year.

**Leadership roles** - Each officer position in the group comes with its own set of responsibilities and challenges which can benefit from specific mentorship and knowledge preservation from previous generations of leaders. This type of mentorship has less to do with passing on concrete materials and processes, and centers more on learning how to think through the complex decisions that must be made, navigate an evolving group culture of peers, and understand the essential tasks the role is responsible for. Below are some specific considerations for some common leadership positions:

1. Music director
  - a. Leading rehearsals
    - i. How to prioritize what to spend rehearsal time on
    - ii. How to develop an effective leadership style that maintains a positive, productive culture in rehearsal
      1. Staying focused but adaptive, avoiding distractions (side conversations, phones), discouraging derailing suggestions, all without being oppressively authoritarian
      2. Great music directors set a tone where rehearsals feel supportive and singers are comfortable to step outside of their usual comfort zone and musically express themselves in an unfiltered and genuine way
    - iii. What warmups does the group use and what is the purpose of each
      1. Warmups / musical exercises often become a mindless thing people go through the same way every rehearsal, when in reality, they deserve a lot of musical and mental focus and vary based upon the group's current situation.
    - iv. Specific techniques to deal with common problems
      1. E.g. if a chord isn't tuning/blending/balancing, building it one voice at a time in order of harmonic priority to let the group hear how it comes together, understand the balance, and quickly identify problematic notes
  - b. Behind-the-scenes decision-making
    - i. How to decide which songs and arrangements should get learned and performed
    - ii. How to craft a competition set
    - iii. How to plan all aspects of the music at shows
    - iv. How to best use your musical resources
      1. E.g. Writing your highest-impact arrangements with your best soloists in mind
  - c. Underlying skills and knowledge
    - i. What makes a great arrangement
    - ii. How are albums made, both musically and logistically
    - iii. How to identify musical talent during auditions
    - iv. Advanced knowledge

1. The anatomy and physiology of singing
  2. Relevant music theory
  3. Basic physics and math of sound
2. President / business manager
    - a. Needs to have a bird's eye view of everything going on with the group
      - i. Keeping all important dates and times in mind to understand what can be scheduled and when
      - ii. Coordinating logistics for any of the group's activities (e.g. travel, lodging, schedules, etc.)
      - iii. See the "Recurrent Events" section for specifics
    - b. Must also having a finger on the pulse of how each the member is feeling
      - i. Provide important feedback to the other leaders to know how hard they can challenge the group to be its best while keeping members healthy
        1. E.g. In theory the group might benefit from a 4 hour rehearsal every night the week before a competition, but if people's lives would fall apart for it, it would be ultimately be counterproductive
      - ii. Conflict resolution - Conflict will inevitably arise, frequently between members and/or leaders with strong creative opinions. A strong leader with great people skills who is less involved in the conflict is very useful to navigate and manage these situations to lead to the outcome that's in the group's best interest
        1. I.e. Good cop/bad cop
  3. Creative director / choreographer
    - a. What is the process of adding choreography to the groups performance
      - i. Who creates it and how is that decided
      - ii. How is it taught and distributed
        1. Need similar rehearsal leadership skills to the music director
        2. Are choreo directions written down or just taught by rote in rehearsal
      - iii. When should choreo be introduced in a song's lifecycle
    - b. Understand other specific responsibilities of this role
      - i. May also encompass wardrobe selection
      - ii. May oversee other non-musical creative tasks like lighting cues for concerts, venue decoration, poster design, management of the group's visual identity (i.e. logos, fonts, colors, etc.), etc.
  4. Album producer - This role requires a particularly large amount of specific information and content to be passed on.
    - a. Knowledge
      - i. The steps of album production
        1. What are they - Arranging, recording, editing, mixing, mastering, distribution ( $\pm$  replication)
        2. What is involved in each step
        3. Does the group do it internally or hire a professional



- a. Pass on experiences with specific professionals and recommendations on who to hire or avoid
  - ii. The technicalities of production - This isn't necessarily essential, but the better people in the group understand the capabilities and limitations of production, the more intentional the group can be about using recording to its full potential
- 5. Webmaster / social media manager
  - a. Ideally would ambitiously create an active online presence with regular new content to keep fans engaged
  - b. This role might require the preservation of branding materials, photos, and other content used for the group's online presence
  - c. At bare minimum, needs to preserve and pass on all information about how to access and update the group's online presence (e.g. all accounts and passwords)
    - i. Many groups lose their websites because passwords are forgotten and accounts expire
- 6. Alumni liaison
  - a. This role is crucial to maintaining access to the knowledge, expertise, and resources of a group's alumni base while making alums still feel connected to the current group
  - b. Essential knowledge
    - i. How to best maintain current contact information for as many alumni as possible
      - 1. Not trivial since people are constantly moving, changing jobs, getting married and perhaps changing their name, etc.
    - ii. How is regular communication maintained between the current group and alumni (e.g. newsletters, groups on social media, etc.)
    - iii. How often does the group hold events focused on alumni, and what does the group do at these events to directly involve alumni
      - 1. E.g. anniversary concerts where alumni perform
  - c. Alumni relations which directly benefit the group
    - i. Advice - The passing of information and experience is a process that is never fully complete, so keeping lines of communication open with alumni is necessary to continue that process even after many years have passed
    - ii. Creative output - The current group might not always have members which have all the skills, experience, or time to create everything that the group needs to maximally succeed. That is to be expected, and often dedicated alumni are more than happy to help with things like arrangements, choreography, graphic design, etc.
    - iii. Money - Members of successful a cappella groups pour their hearts and souls into the group when they are members. Years after they graduate, they will often be willing and eager to help the group financially if they've

become professionally successful to facilitate current members having a similarly rewarding experience.

- iv. Housing - Alumni are often willing to host the group if the group goes on tour near where they live
- d. Alumni relations which directly benefit the alumni
  - i. Being a part of an ambitious and intensive a cappella group is often one of the fondest memories alumni have from their college years. Creating a longitudinal culture that keeps those alumni engaged maintains a lifelong network of friends that spans numerous generations that benefits everyone.
  - ii. Alumni events give everyone a great excuse to reunite when they otherwise might not see each other very often, as well as get to know the members of the current group